



# **Improving America's Schools Act (IASA) and Class-Size Reduction (CSR)**

***FY 2002 Final Report/  
Carry-Over Application  
DIRECTIONS***



***Improving America's Schools Act (IASA)  
Fiscal Year 2002  
Final Report/ Carry-Over Application  
DIRECTIONS***

**FINAL REPORT**

The following pages must be submitted for the **Final Report**:

- Title Page
- Status Report
- CSR Annual Report
- Budget Summary: Report actual expenditures incurred during the project period.
- Budget Detail: Report actual expenditures incurred during the project period.
- Budget Detail/Administrative Expenditures: Report administrative expenditures incurred, *if applicable*
- Federal Equipment Inventory: Complete if equipment was purchased, using \$2,000 threshold.

**CARRY-OVER APPLICATION**

The following ***additional*** pages must be submitted **if submitting a Carry-Over Application**:

- Budget Summary – Proposed: Report proposed expenditures to be incurred during the next project period.
- Budget Detail – Proposed: Indicate proposed expenditures to be incurred during the next project period. Reference the Program Plan activity numbers (column 6) from the FY 2003 NCLB approved application, describing activities to be supported through carry-over funds in the “Justification Codes” column.
- Budget Detail – Proposed Administrative Costs: Indicate proposed expenditures, *if applicable*.
- Program Plan: Complete updated FY 2003 NCLB Program Plan pages *only* if the carry-over funds will be used to support activities not described in the FY 2003 NCLB approved application or a subsequently approved amendment.

**NOTE:** FY 2002 IASA/CSR funds requested for carry-over are subject to current statutes, regulations, and applications (No Child Left Behind Act and FY 2003 NCLB subgrant application). FY 2002 funds may be used for FY 2003 carry-over as follows:

<u>FY 2002 IASA</u>	<u>FY 2003 NCLB</u>
Title I	Title I
Title II	Title II-A
Title IV	Title IV
Title VI	Title V
CSR	Title II-A

**NOTE:** Verify that all budgetary constraints are met:

- In FY **2002**, no more than 5 percent of Titles I, II, IV and VI funds, and no more than 3 percent of CSR funds may be used for administrative costs. The administrative expenditures plus the proposed administrative carry-over for FY **2003** may not exceed 5 percent per Title and 2 percent for Titles III and IV.
- For LEAs awarded \$50,000 or more in Title I, the carry-over may not exceed 15% of the amount without a waiver within a three-year time period.
- Title IV funds cannot exceed 25% of the approved Title IV amount without an acceptable explanation.

<b><i>FINAL REPORT/CARRY-OVER APPLICATION – TITLE PAGE</i></b>
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- Check appropriate box to indicate if LEA is an individual applicant or a consortium applicant.
- Check type of report submitted (Final Report for FY 2002 and/or Carry-Over Application for FY 2003). Check both boxes if LEA is requesting to carry over funds into the next project period.
- Complete project code with LEA's four-digit district code.

Items 1-4. Complete all identifying information.

Item 5. Enter the award amount for each Title from the LEA's originally approved application Title Page (item 6f).

Item 6. Enter the amount expended for each Title during the project period (9/1/2001 - 8/31/2002).

Item 7. Subtract the amount in item 6 from the amount in item 5 and enter the difference.

Item 8. Enter the unexpended balance amounts from item 7 if applying to carry forward funds into the next project period.

Item 9. Subtract item 8 from item 7 and enter the amount to be returned to NJDOE. Enclose a check for the indicated amount payable to ***Treasurer, State of New Jersey***, and submit with a copy of the first page of the report to:

**Department of Education  
Office of Budget and Accounting  
Revenue and Grant Services  
PO Box 500  
Trenton, NJ 08625-0500**

Item 10. Total each column.

Item 11. Provide a brief, but specific, description of why all funds were not expended/obligated within the project period. **This must be completed if funds are indicated in item 7 or item 8.**

Item 12. Signature of Board Secretary and Board Approval date (if requesting to carry over funds). Submit a copy of the board resolution if the Carry-Over Application is submitted prior to the board approval date.

Item 13. Signature of Chief School Administrator and date.

Item 14. If requesting to carry over funds, consortium applicants must check box to confirm that all participating districts agree with the Carry-Over Application.

## ***FINAL REPORT – STATUS REPORT***

- Complete identifying information including project code with LEA’s four-digit district code.

**Goal/Objective/Activity Code:** Indicate the codes from the originally approved application or subsequently approved amendment(s).

**Status of Objectives Based on Evaluation Plan Results:** Describe the LEA’s progress toward meeting all of the *measurable objectives and performance standards* described in the approved application or subsequently approved amendment(s). Briefly describe the activities completed and the results obtained during the project period. Specific reference should be made to the elements outlined in the approved evaluation plan.

**CSR Annual Report:** Attach a copy of the “Annual Report” that is distributed to the public.

In the CSR Application, the LEA described its plan to produce an Annual Report to parents, the general public and the NJDOE. In the Annual Report the LEA was to provide the following information: the number of fully qualified teachers hired, grades assigned, impact on class size, progress towards increasing the percentage of classes in core academic areas taught by fully qualified teachers, professional development description (number of participants, including staff from private schools and grades taught) and academic (pre-and post-testing) and nonacademic information (attendance, discipline, promotion trends, instruction time, student/teacher relationship, socialization, teacher retention/job satisfaction).

## ***FINAL REPORT – BUDGET SUMMARY – EXPENDITURES***

- Complete the identifying information including project code with LEA’s four-digit district code.
- By expenditure category, indicate the amounts *expended* during the project period. Enter subtotals and total amounts. ***Round off to the nearest dollar.***
  - Equipment (items costing \$2,000.00 or more) listed under 400-731 and 400-732 must be itemized on the Federal Equipment Inventory page.
- Title II LEA Match: Enter the amount expended. This amount must equal 50% of the public school amount expended in the Title II Federal column. The Title II match may only be used for Title II allowable expenditures.
- The Grand Total for all expenditures must equal the expended amount entered on the Title Page, item 6.
- The LEA Business Administrator **must** sign and date this page.

### ***FINAL REPORT – BUDGET DETAIL – EXPENDITURES***

- Complete identifying information including project code with LEA's four-digit district code.
- Provide detail to match entries on the Budget Summary page. Include the function/object codes, expenditure categories, a description of the expenditures, and the amount expended. *Round off to the nearest dollar.*
- Where salary is allocated for TPAF employees, **ensure the minimum percentage for FICA has been expended/obligated for 200-200.** (For FY 2002, the TPAF amount was zero.) For those employees working for more than their base salary (i.e., stipends), an additional 7.65 percent of the wages in excess of the base salary must be budgeted for FICA.
- The totals for each GAAP code must match the totals listed on the Budget Summary – Expenditures page.
- The Grand Totals must equal the amounts listed on the Title Page, item 6, and the Total Project Expenditures on the Budget Summary – Expenditures page.
- The LEA Business Administrator **must** sign and date this page.

### ***FINAL REPORT – BUDGET DETAIL – ADMINISTRATIVE EXPENDITURES***

- Follow the same directions as the Final Report – Budget Detail – Expenditures page. Show *only* administrative costs incurred. Administrative costs must be listed on this page.
- The LEA Business Administrator **must** sign and date this page.

### ***FINAL REPORT – FEDERAL EQUIPMENT INVENTORY***

- Complete identifying information including project code with LEA's four-digit district code.
- All columns must be completed for each piece of equipment costing \$2,000 or more purchased with federal program funds covered by this application.
- The total of the unit acquisition costs listed must equal the equipment costs listed on the Budget Summary and Budget Detail pages under expenditure categories 400-731 and 400-732.
- If the equipment does not have a serial number, an identification number must be assigned.
- For items partially funded, indicate the total unit acquisition cost, the IASA/CSR cost *by each Title* and the percentage of IASA/CSR funds utilized by Title.
- The LEA Business Administrator **must** sign and date this page.

## **CARRY-OVER APPLICATION**

Use whole dollars if expenditure funds were rounded off to the nearest dollar.

### ***CARRY-OVER APPLICATION – BUDGET SUMMARY – PROPOSED***

- Complete the identifying information including project code with LEA's four-digit district code.
- By expenditure category, indicate the amounts budgeted for carry-over. Enter subtotals and total amounts.
- The Proposed Expenditures must equal the Proposed Carry-Over amounts entered on the Title Page, item 8.
- The LEA Business Administrator **must** sign and date this page.

### ***CARRY-OVER APPLICATION – BUDGET DETAIL – PROPOSED***

- Complete the identifying information including project code with LEA's four-digit district code.
- Provide detail to match entries on the Carry-Over Application – Budget Summary – Proposed page. Include the function/object codes, expenditure categories for the activities supported by the project, a description of the expenditure, and the amount proposed.
- Where salary is allocated for TPAF employees, **ensure that 15 percent for TPAF/FICA has been budgeted for 200-200.** For those employees working for more than their base salary (i.e., stipends), an additional 7.65 percent of the wages in excess of the base salary must be budgeted for FICA.
- The totals for each GAAP code must match the totals listed on the Carry-Over Application – Budget Summary – Proposed page.
- Justification Column: Enter the codes from the approved Program Plan that support the proposed activities.
- The Grand Totals must equal the amounts listed on the Title Page, item 8, and the Total Proposed Project Costs on the Carry-Over Application – Budget Summary – Proposed page.
- The LEA Business Administrator **must** sign and date this page.

<p style="text-align: center;"><b><i>CARRY-OVER APPLICATION – BUDGET DETAIL – PROPOSED ADMINISTRATIVE COSTS</i></b></p>
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- Follow the same directions as the Carry-Over Application – Budget Detail – Proposed page. Show only *proposed* administrative costs. Administrative costs must be listed on this page.
- **Note:** Expended administrative costs plus any proposed administrative carry-over must not exceed the maximum allowable percentage for FY 2003, that is, 5 percent of the original approved award for Titles I, II, and V (formerly VI). Since the maximum allowable administrative cost for FY 2003 NCLB Title IV is 2 percent, LEAs that have expended 2 percent or more in FY 2002 may not budget further administrative costs for carry-over.
- The LEA Business Administrator **must** sign and date this page.